PERSONIX
FINANCIAL GROUP

CLIENT CONSENT TO OBTAIN INFORMATION

I, _____[Full names], with the following Identity Number _____, in my personal capacity or, where applicable, in a representative capacity for and on behalf of _____ [State if not applicable], acknowledge the following:

• sound and proper financial advice can only be provided with full disclosure of relevant Information relating to appropriate personal, including private, information for the purposes of determining and advising on my/our financial situation and financial product experience and objectives, in the process of acquiring, servicing or maintaining any financial products, including but not limited to any information relating to or interest in any long-term insurance, unit trust or any other financial products or services, with any long-term insurer, unit trust manager or other financial institution;

• My/our interests shall be best served if that Information is made available to authorised financial service providers with a legitimate interest in receiving such information for those purposes.

• I/we accordingly confirm, for the purposes of providing the said sound and proper financial advice to me/us, that full permission and authority is granted to **PERSONIX FINANCIAL SERVICES** to obtain any and all such Information via The Financial Services Exchange (Pty) Ltd, trading as Astute, or any other institution providing a mechanism for the transmission of such information.

I/we herewith give consent for the long-term insurer, unit trust manager or other financial institution possessing such information to release such Information to the said Authorised User via Astute, and I/we confirm that such Authorised User shall be acting on my/our behalf or in my/our interest and I/we waive any right to privacy only for the purposes as stated above.

I/we further acknowledge that this consent to obtain information on my behalf will remain effective until cancelled by me/us in writing.

Thus, done and signed at _____ on this _____ day of _____, 20_____

_____

Signature of Client

PERSONIX
FINANCIAL GROUP

OFFICE +27 21 699-0800
EMAIL info@personix.co.za
www.personix.co.za

INSURANCE | WEALTH MANAGEMENT | PROPERTY | ACCOUNTING & ADVISORY

5 Kromboom Road,
Rondebosch Cape Town
7700, South Africa

PERSONIX
FINANCIAL GROUP

OFFICE +27 21 699-0800
EMAIL info@personix.co.za
www.personix.co.za

INSURANCE | WEALTH MANAGEMENT | PROPERTY | ACCOUNTING & ADVISORY

5 Kromboom Road,
Rondebosch Cape Town
7700, South Africa